

Fairfax County Retirement Systems
Request an Estimate
School Employee

Please Note: You may request an estimate if you are one year or less from your earliest retirement date. If you are more than one year from your earliest retirement date you will receive a copy of your Annual Benefit Statement from June 30. Estimates may take 60 to 90 days to be prepared. Please visit the Retirement Agency internet site at <http://www.fairfaxcounty.gov/retbrd/0sregist.htm> to "Do Your Own Estimate" if you would like to use variable retirement dates and salary information.

Please use the following information to calculate a retirement estimate for me.

Full Name: _____

Agency/Job Title: _____

Social Security Number: _____ Age at Present: _____

Date of Birth: _____ Daytime Phone: (_____) _____

Specify retirement date to be used in estimate: _____, **OR** check the appropriate box

☐ first date eligible for normal retirement **OR** ☐ first date eligible for early service retirement ☐

* **Please note:** All estimates are based on current information at the time the estimate was generated. You will be provided with an estimate for ONE retirement date. **If you request multiple dates, only the first date will be used to calculate your benefit.** Please see complete policy for estimate requests on the reverse (page 2).

I have some part-time service? Yes ☐ Dates: _____

Break(s) in service? Yes ☐ Dates: _____

For information on Optional Joint & Last Survivor Option, fill out the following:

Name of Spouse: _____ Date of Birth of Spouse: _____

Comments: _____

Signature: _____ Date: _____

Please return this form to:
Fairfax County Retirement Administration Agency
10680 Main Street, Suite 280, Fairfax, VA 22030-3812
Fax: 703-273-3185 Phone 703-279-8200

Retirement Agency Policy on Benefit Estimate Requests – Employees’

The Retirement Agency’s policy is to provide an estimate of retirement benefits to individuals having less than one year before they are eligible for early retirement. Employees who are **within one year of their early retirement eligibility date** may request an estimate of their retirement benefits using an “Estimate Request” form. This form is available at the Retirement Agency website, may be picked up from our office, or you may request a form be faxed or mailed to you.

Retirement benefit figures will be calculated using any sick leave balance or leave without pay balances within that employee’s record. **Individuals are limited to one request for an estimate in the calendar year.** You may choose ONE date for us to calculate your benefit OR you may check the box for earliest eligibility for regular retirement. If you write down multiple dates, only the first date listed will be used to do your calculations.

If you are not within one year of retirement eligibility, you can use our website services to get an approximate estimate of your retirement benefits.

**The “Do Your Own Estimate” internet-based program can be found at
www.fairfaxcounty.gov/retbrd/osregist.htm**

The Retirement website allows members to work up their own projections, based on individual assumptions of salary increases and variable retirement dates. Members can adjust their projected retirement date to account for sick leave balances and leave without pay balances. Please check PRISM or check with your payroll contact at your agency to verify your sick leave and leave without pay balances.

If you are using your current sick leave balance to determine when you can retire, remember that every 172 hours of sick leave equates to one month of service. You can visit the Retirement Agency internet site at www.fairfaxcounty.gov/retbrd for more information on how sick leave can affect your retirement eligibility. A series of Fact and Tip Sheets that address frequently asked questions of members regarding sick leave credit and other subjects is available on the Retirement Agency website at www.fairfaxcounty.gov/retbrd/FAQ.htm.

Full-time members of the County Retirement Systems receive an "Annual Benefit Statement" once per year (normally in late August). Statements are mailed to members who were active in one of the three Retirement Systems as of June 30 of that year. The Annual Benefit Statement program does not account for sick leave, leave without pay (LWOP) or breaks in service, all of which would have an impact on the actual retirement benefit, should a members' record reflect any of those items. To request a more detailed estimate from the Retirement Agency, that will take these factors into account and can also give information on a Joint and Last Survivor option, a written request is required. These requests are limited to once per calendar year and are only provided to those members who are determined to meet the “within one year” criteria.

All requests for estimates must be in writing on an “Estimate Request” form from the Retirement Agency. Completed request forms can be faxed or mailed to the Retirement Agency. Once your estimate request is received and your retirement eligibility date is verified, your estimate will be calculated and mailed to your home address within 60 to 90 days. This request form is available for download at www.fairfaxcounty.gov/retbrd/estimateform.pdf.

If you have difficulty understanding your annual benefit statement or your retirement benefit estimate, please refer to your Fairfax County Employees’ Retirement System Handbook. A copy of this document can be downloaded from www.fairfaxcounty.gov/retbrd/emphandbook.pdf or you can request one by calling the Retirement Agency at (703) 279-8200. The Retirement System Handbook is your best resource for examples and information regarding your retirement benefit.